

Televisión A UN MÁS ALTO NIVEL

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Multichannel NEWS International

THE WORLD'S SOURCE FOR TV AND TELECOM ANALYSIS

1998 Latin American Network Connections

Consolidation continued in Latin America's pay television programming market over the last year. As our 1998 chart shows, more independents — among them The Travel Channel and TeleUNO — became parts of network bundles. The brightest new star on the chart is clearly CEI CitiCorp Holdings S.A., which over the last year has become a pillar of Argentina's media industry and has the program holdings to prove it. Tele-Communications International Inc. has also made good on its plans to establish a Latin American programming bundle.

And if current market speculation proves true, a lot more consolidation is on the way, as both local and multinational programming players gird for the future.

Our 1998 chart was researched by Multichannel News International senior editor Jo Dallas and managing editor Mike Galletto, with invaluable background from Communications Equity Associates Inc. Graphic rendering was provided by Paolo Prestinari.



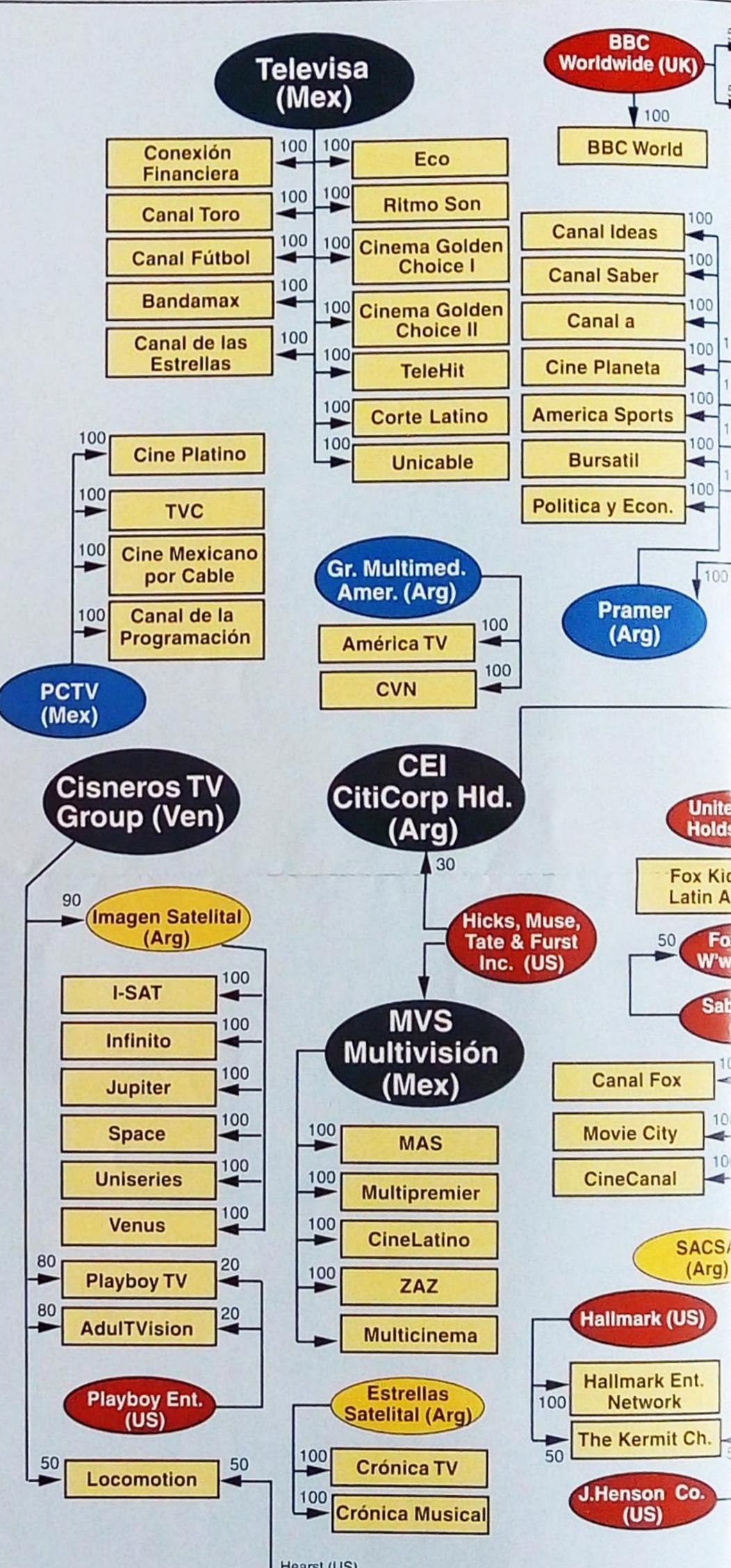
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Note: The only terrestrial networks included on this chart are those that have equity ties to subscription TV channels or those that are distributed across the region as superchannels. Only those channels already launched or expected to launch in September are included. The chart only includes deals that were fully completed by September 1998.

Arg = Argentina; Bra = Brazil; Chi = Chile; Col = Colombia; Ger = Germany; Ita = Italy;

Mex = Mexico; Por = Portugal; Spa = Spain; UK = United Kingdom; US = United States of America; Ven = Venezuela.

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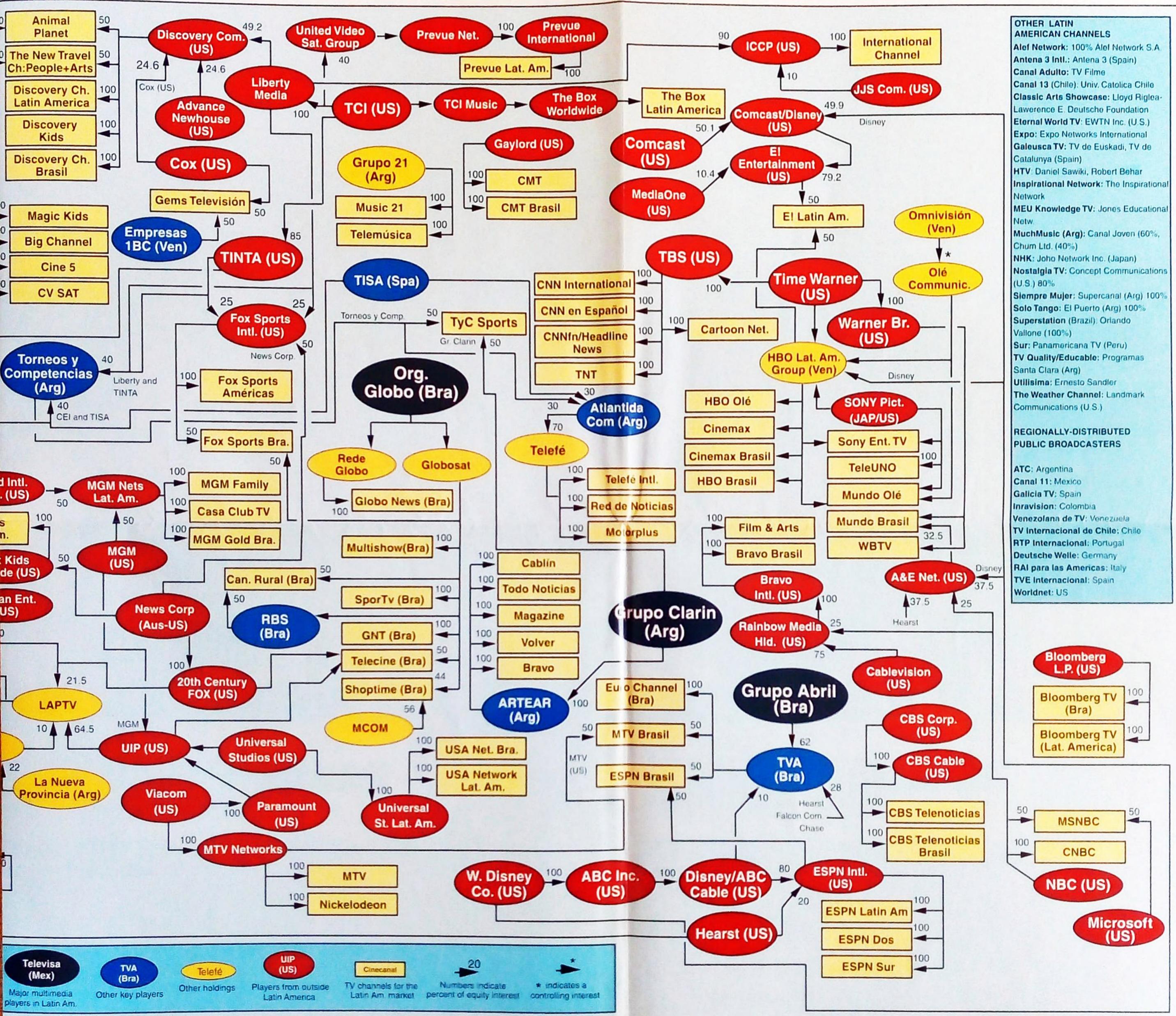
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